M3 Update

September 2022

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VP Product Management

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How many customers do we have provisioned in M3 Cloud (we had 250 October 2021)

294
322
376

How many API calls do we have per hour on average in a single cloud farm

1,5 mill/h
3,2 mill/h
6,8 mill/h

Infor M3 Cloud highlights

+2500 (1800)
Improvements continuously delivered

+80%
2021 growth of provisioned customers in M3 Cloud

71
Countries available in M3 Cloud

+370 (250)
Customers provisioned globally in M3 Cloud

+80%
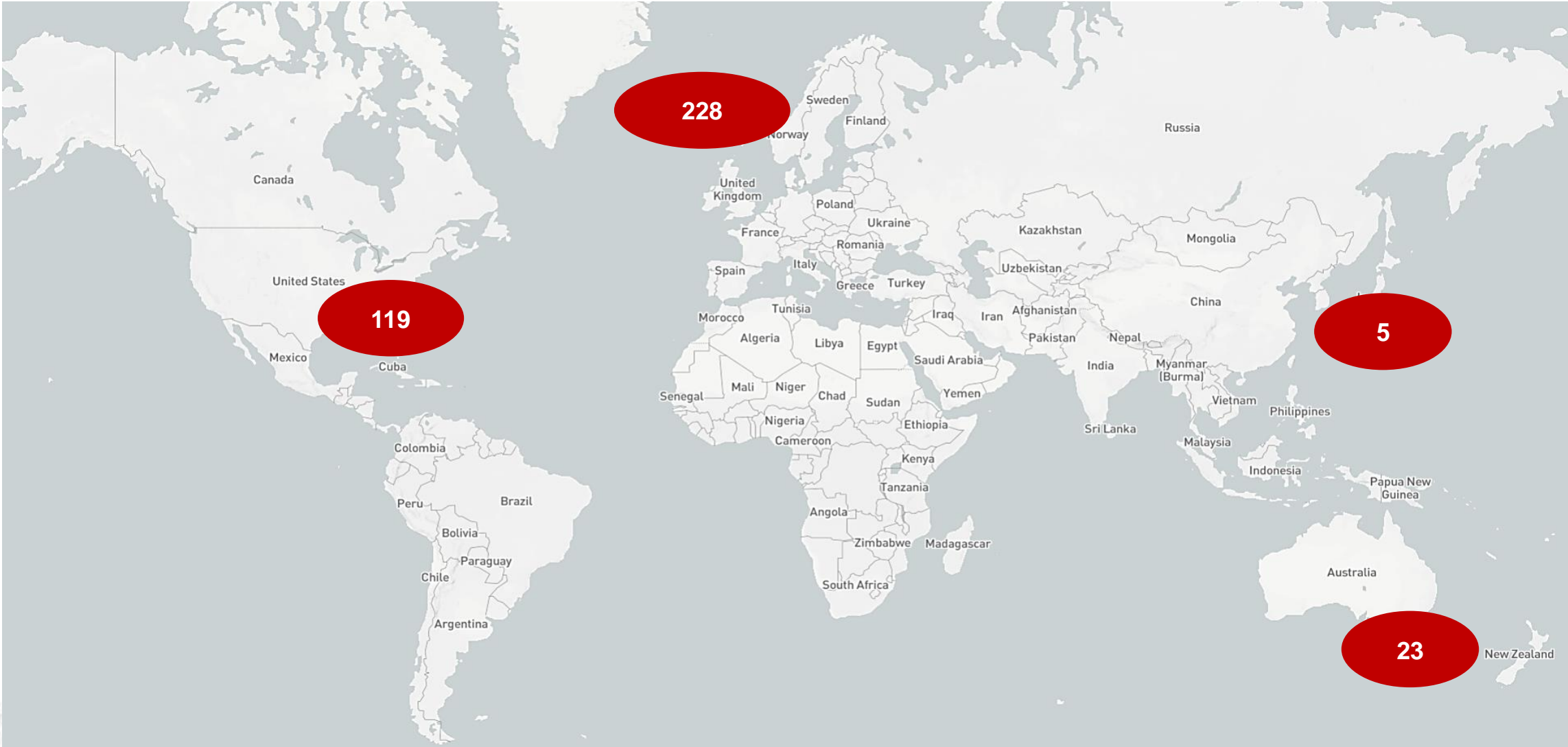Revenue is M3 Cloud (FY21)

+26
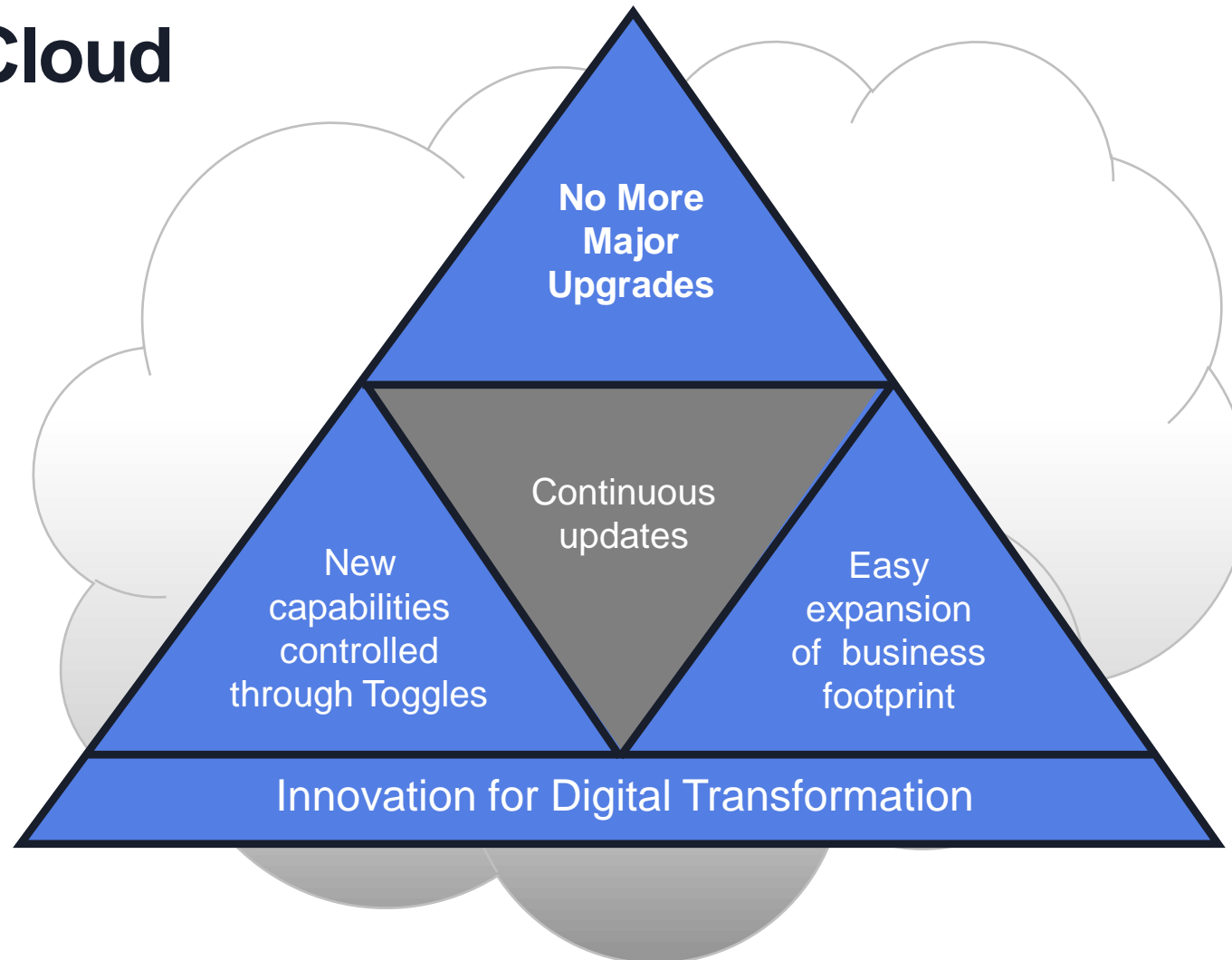Strategic Solutions accessible in M3 Cloud

Cloetta

AHF PRODUCTS

Pfaudler
Defining the standard

Watami

cyanco
Your Mining Solution

emergentcold

Q-LINEA

Intersnack

GREENYARD

Independent

HILCO VISION

MY FOOD BAG

NORLED

Saarioinen

PROHOUSING

KIVIKS MUSTERI

infor

Active Production tenants / 376 Customers

M3 Cloud CE Customers

**124 Customers Live**

Available in the M3 Cloud

Highlights

Industry Content
Homepages & Widgets

Go get them and use or be inspired by them

The Homepages have extended the widget catalogue with some unique capabilities.

- 20+ re-designed Homepages
- Purchase requisition (for non-stocked items)
- Upload of data via .csv file
- Customer contacts
- Customer look up
- Available to spend
- Create item (minor info)
- Create supplier (minor info)
- Receive purchase order (non-stocked for instance)
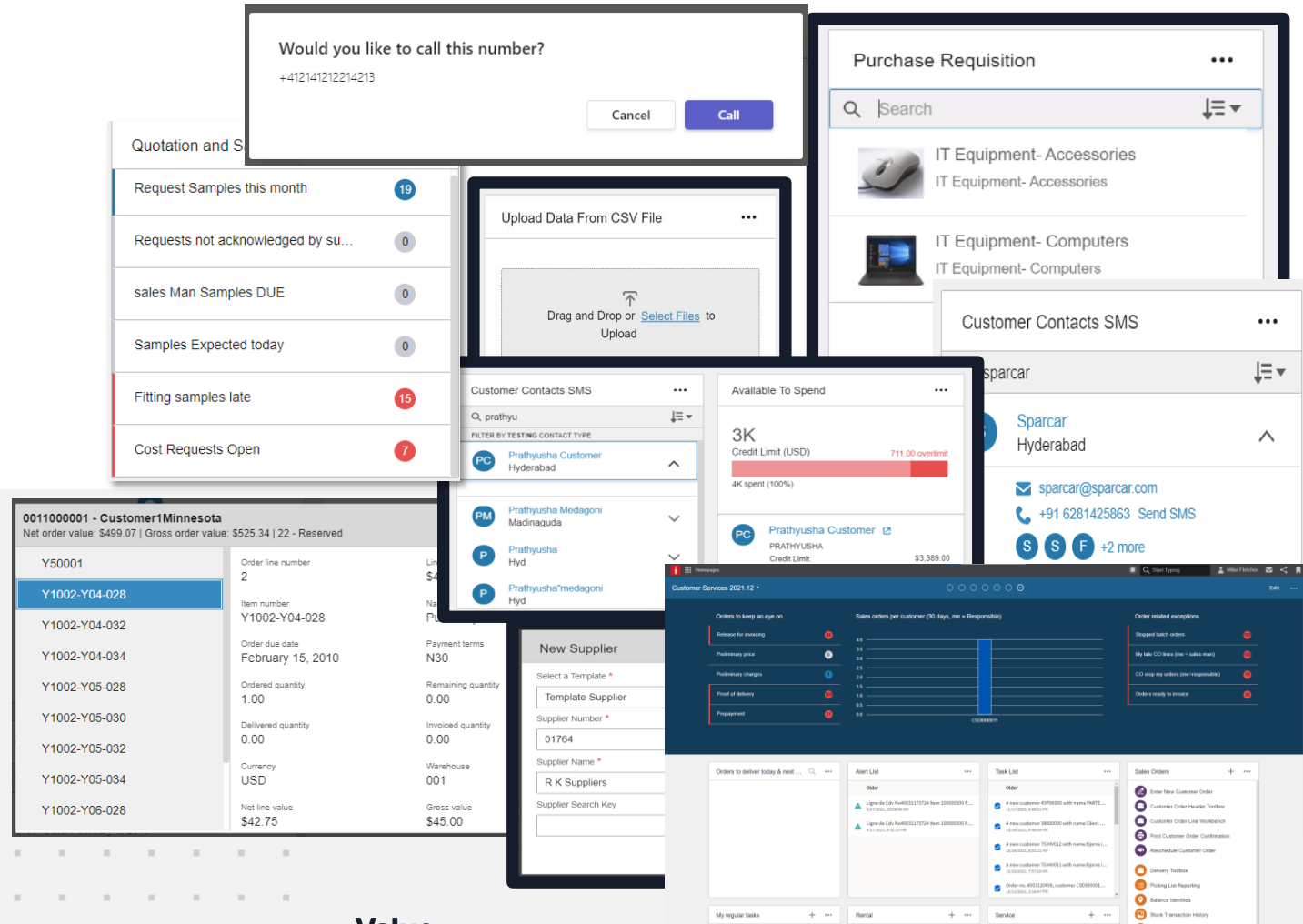
Value

- Simplify processes

- Productiszed widgets on your role based homepage

- Get inspired and create your own

✓ Available in the M3 Cloud
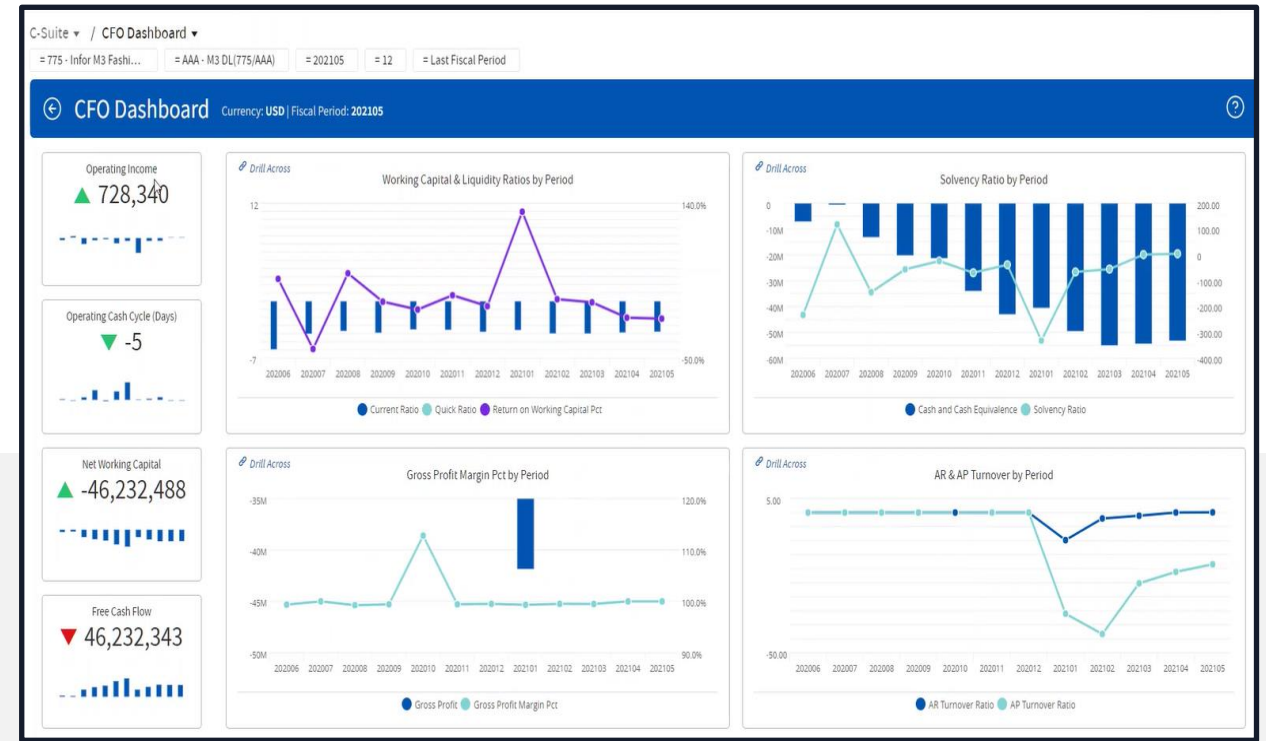
M3 Analytics for M3 Cloud

C- Level Dashboards
C-Suite

Delivered as part of the M3 C-Suite collection, within M3 Analytics

- CFO Dashboard
- CEO Dashboard
- Key Ratio Strategic
- Key Ratio Operational
- Income Statement
- Balance Sheet

- Updated UI design

Value

- C-Level business leaders need visibility of their business to help them measure performance, making sure they have the insights that help them drive towards improving their business.

M3 Financials

Financial Accounting
Corporate Netting

New functionality to report payments between companies inside a corporation. The objective is to reduce number of payments and the cost.
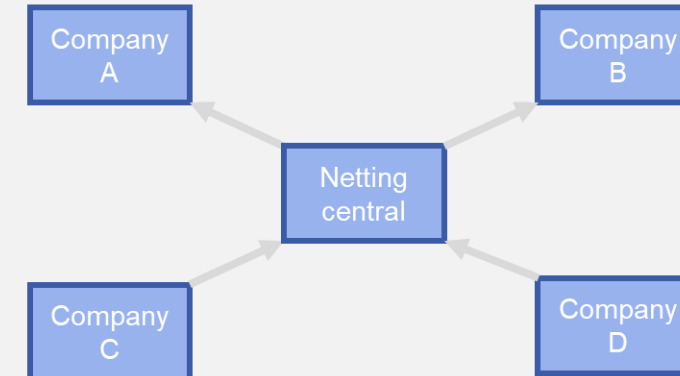
Included changes:

- Introduce a new payment class – Netting
- Reporting of outstanding customer invoices and supplier invoices to a netting central
- Receive feedback after netting and allocate that to reported invoices
- Register the bank-transaction

Payment flow without Netting
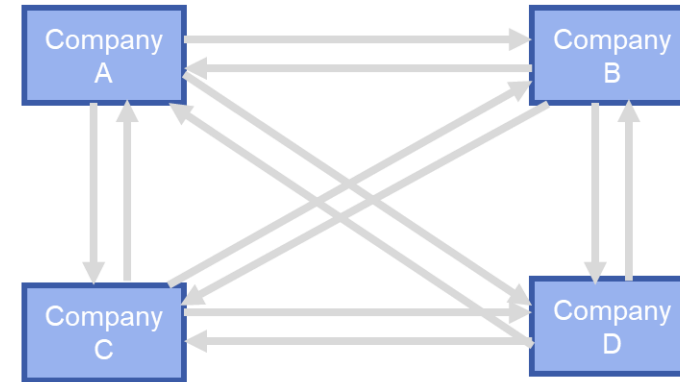
Payment flow with Netting

Value

- Reduce number of payments
- Reduce the cost for payments
- Optimize the cashflow within the corporate environment

Highlight

Infor M3 Portals
M3 Equipment Portal

Streamlined customer experience through self-service portals

- Highly configurable user experience
- Targeting zero end-user training requirements.
- Self-service:
  - maintain their company information
  - create service requests
  - update meter values (equipment usage)
  - create rental contract requests
- View their equipment information including service history, warranty details
- View invoices
- Access electronic content (manuals, guides…)
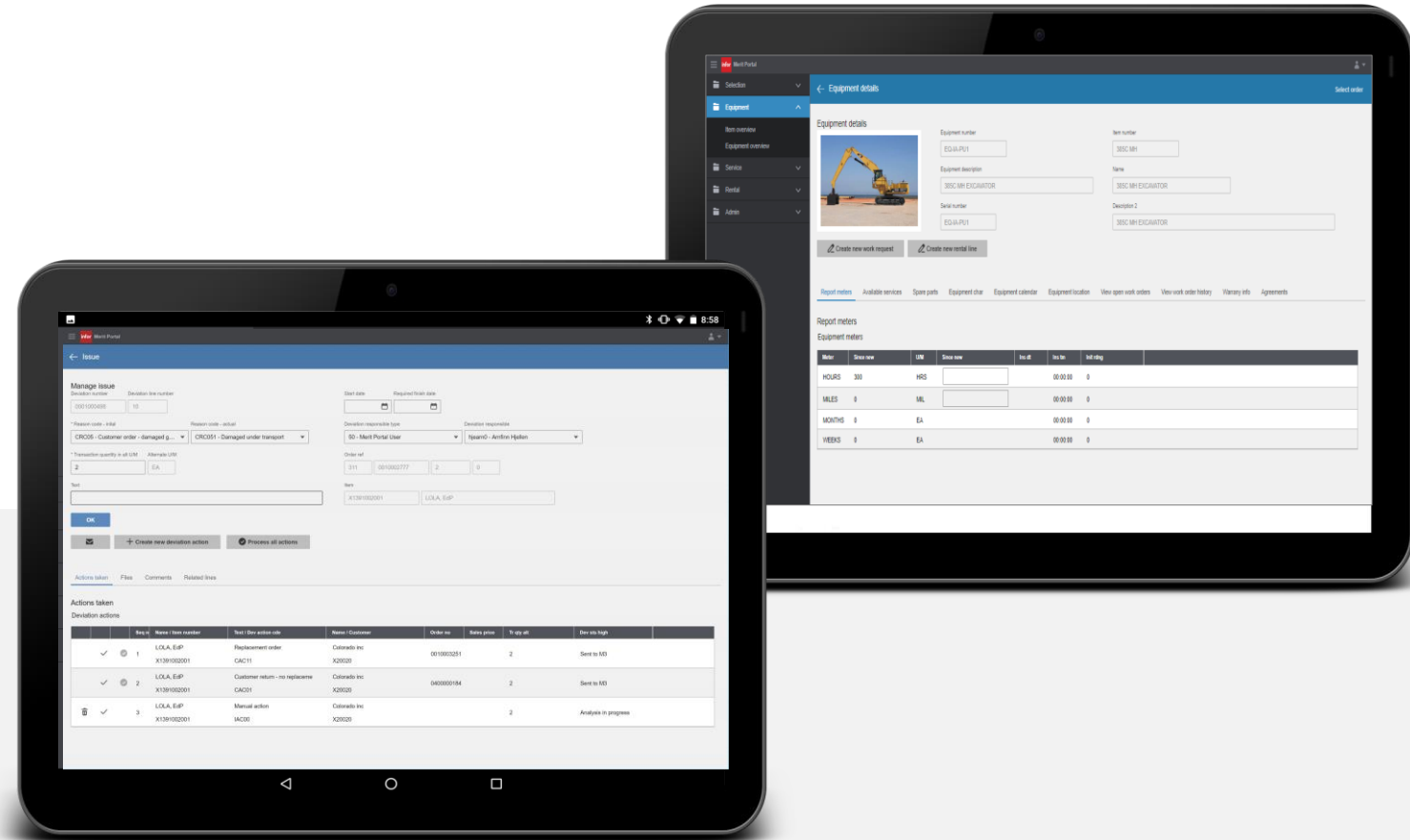
Value

- End user self-service reduces internal effort
- Quick and efficient process captures information at source
- Easy to use and configure
- Flexible technology

Available in the M3 Cloud

Highlight

Factory Track for M3
Mobility for warehouse and manufacturing

Major enhancements in 2021 and 2022

70+ enhancements in 2021

- Enhanced alternate U/M and pack size support
- Sublot support incl. new FLEX-MOVE
- MO-operations - Start and Stop
- Move multiple balance Ids and Containers
- Introduce selection of warehouse in transactions
- Zoom-scaling improve usability cross devices
- Allow to skip steps in Warehouse Move
- Bridging data to remove repetitive scans
- Free fields in many tile/list –views
- Introduce column order and width in grid view
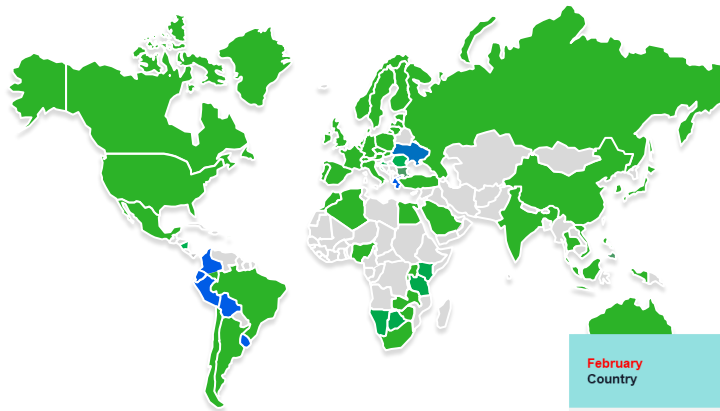- Print selected delivery documents
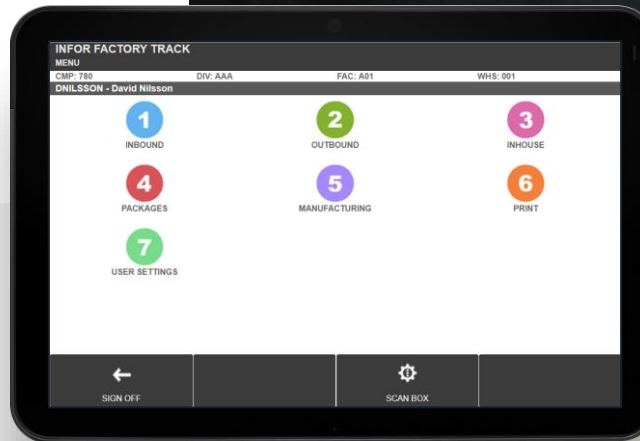
Value

- User productivity through faster and more streamlined processes
- Reduce costs related to shipping / consuming wrong item
- Improved customer service levels and improved traceability

✓ Available in the M3 Cloud

M3 Localizations
Delivered – First half 2022

The following local statutory and regulatory requirements in existing GA countries was delivered during the period

February

Country	Description	Version
ITALY	Intrastat – new version	M3 CE
LITHUANIA	Intrastat – New version	M3 CE
NORWAY	SAF-t Update 1.20	M3 CE
RUSSIA	TN Waybill update	M3 13.4
ITALY	Supplier VAT exemptions	M3 CE
BRAZIL	Exit point for CFOP code	M3 CE
	CNPJ at Facilty level	M3 CE

March

Country	Description	Version
GUATEMALA	Export invoice – e format	M3 CE
HUNGARY	Intrastat KSH Electra Introduced	M3 CE
SLOVAKIA	Intrastat – new version	M3 CE
FINLAND	Intrastat – New version	M3 CE
ESTONIA	Intrastat – New version	M3 CE
CZECH REPUBLIC	Intrastat – New version	M3 CE
POLAND	JPK VAT V7M – Updates	M3 CE

May

Country	Description	Version
HUNGARY	Intrastat KSH Electra Introduced	M3 13,4
BRAZIL	Possible to exclude ICMS from PI and COFINS	M3 CE
SWITZERLAND	ADD ESR reference in API	M3 CE
LITHUANIA	Supplier payments ISO20022 Luminor Bank	M3 CE
MEXICO	CFDI updated to 4.0	M3 CE
MEXICO	DIOT update to 1.2.1	M3 13.4
SWITZERLAND	CAMT053 – changes	M3 CE
USA	Improved tax point function for Vertex	M3 CE
SWEDEN		
BRAZIL		
INDIA		

January

Country	Description	Version
ITALY	SDI for supplier invoices	
ITALY	Prolong exemption certificate number	
FRANCE	E-Invoice Peppol	
AUSTRIA	Intrastat – Changes	
SLOVAKIA	Intrastat – Changes	
USA	1099 MISC 2 part 1099 NEC 2 or 3 parts	
DENMARK	Intrastat Changes	
POLAND	Changes for JPK	
AUSTRALIA	E-Invoice Peppol	
NEW ZEALAND	E-Invoice Peppol	
NORWAY	E-Invoice EHF 3.0	
SINGAPORE	E-Invoice Peppol	
ARGENTINA	E-Delivery note	

April

Country	Description	Version
MEXICO	DIOT – upgrade to version 1.2.1	M3 CE
ITALY	Intrastat – updated version	M3 CE
DENMARK	Bank-statement CAMT.054 for Danske Bank	M3 CE
SAUDÌ ARABIA	E-Invoice	M3 13.4
AUSTRALIA	E-Invoice PEPPOL	M3 CE
NEW ZEALAND	E-Invoice PEPPOL	M3 CE
RUSSIA	TN Waybill – Updated	M3 CE
SAUDI ARABIA	E-Invoice	M3 CE
MEXICO	Advanced invoice offset by credit notes	M3 CE
NORWAY	VAT Return – Update	M3 CE

June

Country	Description	Version
HUNGARY	Upgrade VAT report 2022 2265 M	M3 CE
INDIA	Tax collection at source S206C(1H)	M3 CE
RUSSIA	Adopted Amount to words for Russian	M3 CE
USA	Supplier payments ACHCCD	M3 CE
SPAIN	Intrastat – Update	M3 CE
LITHUANIIA	SAF-t new version	M3 13.4
HUNGARY	Intrastat KSH Electra Introduced	M3 CE

Infor

Infor Distribution Enterprise

Momentum
Accomplishments to date

	~1000 enhancements*	~1000 enhancements*	~400 enhancements*
	2020	**2021**	**2022—present**
Industry	• IFRS15 Rev Rec Goods In Transit • Supplier Consignment Stock • Central Procurement Agreement • Business chain levels extension	• Extended Internal Sales Order • IPW purchase agreement planning • Trade Agreement • Corporate accounting and reporting	• Trade agreements, graduated accruals • Pricing Groups for large customers • Configurable text blocks for output • New process for handling intermediates • More local customer exceptions
Experiences	• New uplifted H5 Client • Edit and Create M3 Homepages • Configurable XML for Ad Hoc Reports • Mobility for Field Service and M3 Customer Lifecycle	• CFO Dashboards • Integrated Analytics • 20+ Homepages and 5 Widgets • Factory Track; Alt UoM, Pack Size, Sublot support • Guatemala, Turkey, Philippines • Multiple improvements in SalesHub	• C-suite analytics with CEO dashboards • M3 Portals - Equipment • Bahamas, Cayman Islands, Puerto Rico • 68 regulatory and statutory items • 5 new homepage widgets • New streamlined labor reporting in MFS • Corporate Netting
Innovation	• Large number of new and enhanced BODs and API's • Integrations i.e. GRC, d/EPM, Coleman, Infor Go, Rhythm • M3 Data synced to Data Lake	• Coleman AI – 3 ML models – 1 optimization model • XtendM3 – Dynamic tables, Data Lake, APIs • Customer messages in Integ Tools • Zero Down Time Patching	• FTK – Rapid scanning of sublots • EDI integration for SPS Commerce • User defined fields for Orders • Data Lake with industry add-ons and data reconciliation • "Bring-your-own" Credit Card provider

Why Infor Cloud

Key design principles

DESIGN
PRINCIPLES

Digitally enabled

Industry specific
& complete

Hyper productive
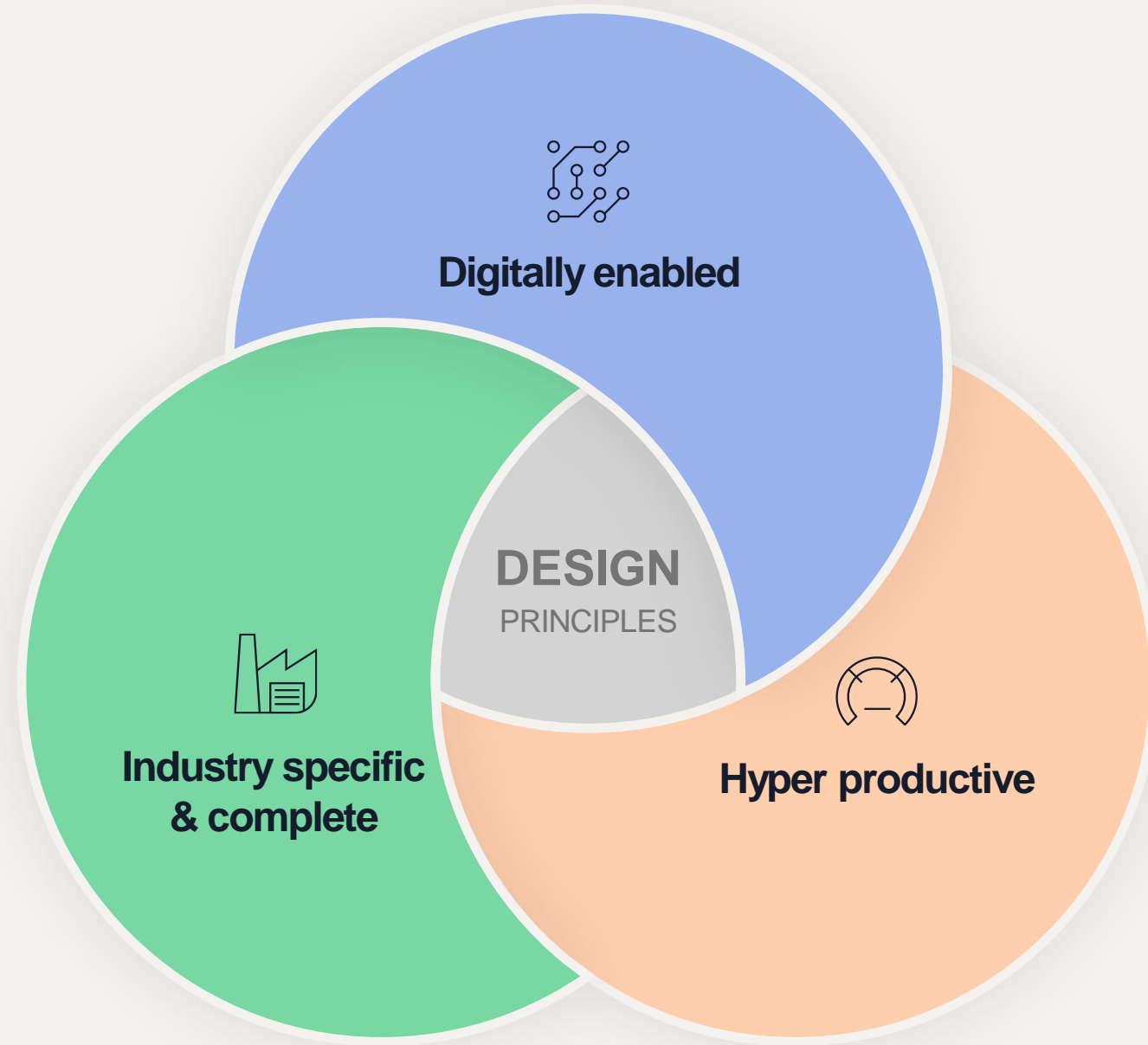
Our core product strategy

Industry specificity & completeness

Time to Value

Industry best processes – evolve to micro-vertical processes & process intelligence

Completeness – e2e Integrated suite – evolve to micro vertical use cases

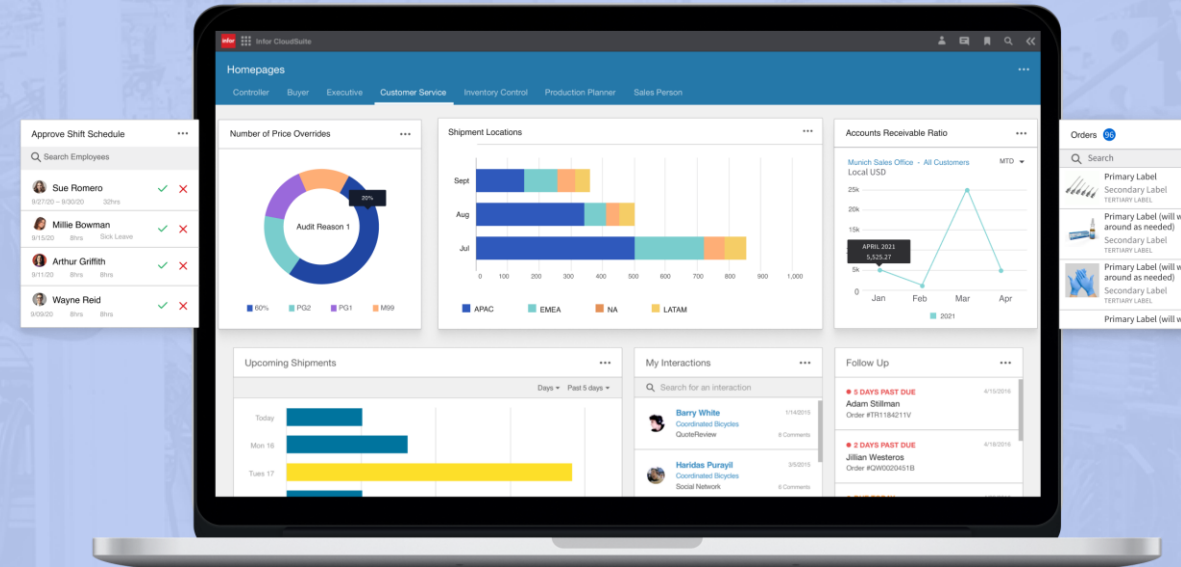Industry role-based automation, KPIs

Industry features: last mile

For focus industries & delivered via **purpose-built** core ERPs

Global

Localizations, translations

Infor Marketplace

Micro-vertical depth, openness & global reach

Our core product strategy

Digitally enabled

Industry APIs

Rich, and enabled
for integration, mobile and
future UX

Industry objects

Rich representation of
connected data for
analytics, machine learning
and
data mining

Extensibility

In app, in business process,
in data, in APIs, in UX, etc.
(low code)

Data architecture

Full automated ETL,
pipelines, Lakehouse, on-
boarding, hybrid, lineage,
real-time, etc.

Intelligent

Embed AI/ML to make
automated decisions /
insights

How do we define a world class cloud ERP

Always current and "on"

- All customers on same version
- Feature toggles
- Resilience, zero downtime

Innovation

- Adopt latest technologies
- Data architecture at core
- AI, ML in key processes

Secure

- Physical security
- Code level
- Process

Extensibility

- UX customizations
- Add on functionality
- Business logic extensions

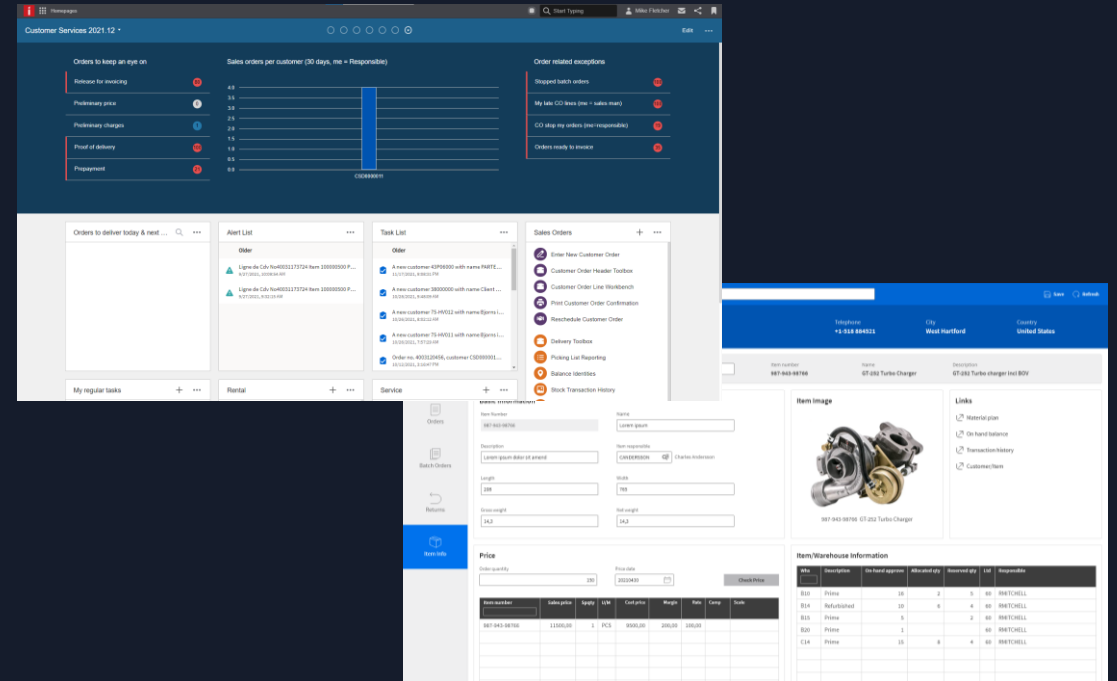### Industry configuration
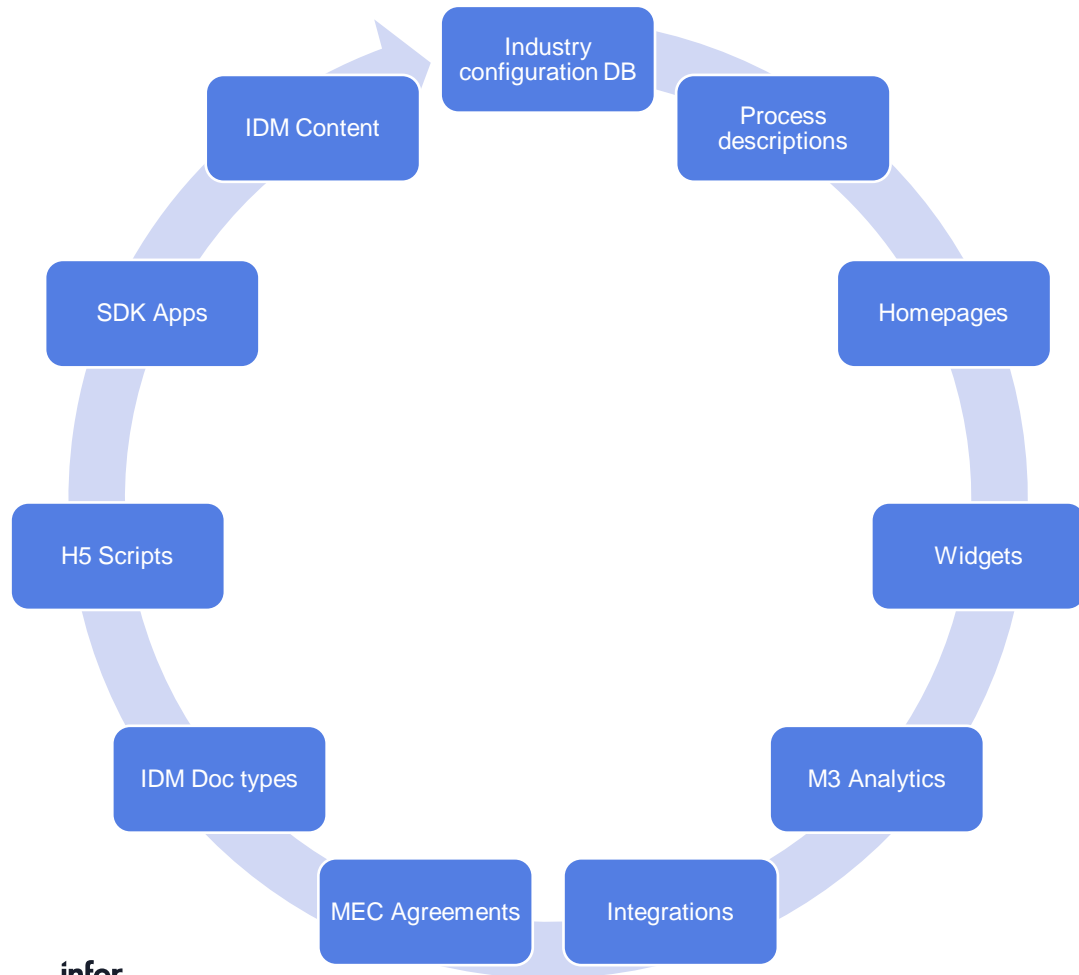
- Pre-configuration
- Content
- Tooling

User Experience

- Role based
- Template applications
- Flexible configurations

Content and configuration

Industry Configuration

- Industry configuration DB
- Process descriptions
- Homepages
- Widgets
- M3 Analytics
- Integrations
- MEC Agreements
- IDM Doc types
- H5 Scripts
- SDK Apps
- IDM Content

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Our objectives

Complete Industry Solutions

1

Provide deep, vertical capabilities and content to drive customer value and global adoption

Deeper extensibility to provide more project agility and meet customer unique requirements

Productive Experiences

2

Deliver user satisfaction and productivity through an intuitive experience. Expanding access to core business processes for wider user group throughout the enterprise. Deliver industry dashboards and homepages

Modern Cloud Technology

3

Utilizing Cloud technologies and big data to provide innovative new ways of doing business

Investing in Cloud services to meet the evolving industry and global requirements. Enabling the agility and scalability to support changing business strategies

The journey we are on

3–5 year direction

Digitally Integrated Organization

2023

- Sustainability Dashboards and Strategic planning
- Multi cloud platforms
- Role based and task oriented UX
- Dynamic workspaces with Infor OS Portal
- TPM-integrated processes
- Image/AI driven use cases
- Inventory and channel management
- Industry content for extended micro-verticals
- Centralized management of content

2024

- The intelligent Industry Cloud
    – from idea, to suggestion into action
- Augmented reality
- Enterprise Quality Management
- PLM – collaborative development
- Automated sustainability reporting
- Automated TPM-settlements
- Standardized EDI – more markets
- Attribute-based ML forecasting techniques
- Enterprise financial with enhanced global footprint

2024+

- Deeper micro vertical functionality
- High productivity UX more roles
- Robotics in repetitive processes
- Further applied innovation
- Global Food Traceability
- Self implementation
- More …

M3 on-premise

Infor will continue to invest in M3 13.4

- M3 13.4 is our on-prem offering
- Up to date platform support
- Selected downgrades from Cloud on a project basis
- Regulatory and statutory updates
- There is currently no end date on M3 13.4 support.

…and consequently

- More details to be announced
- Containerized M3 (CM3) is put on hold

Americas

Argentina
Bahamas
Bolivia
Brazil*
Canada
Cayman Island
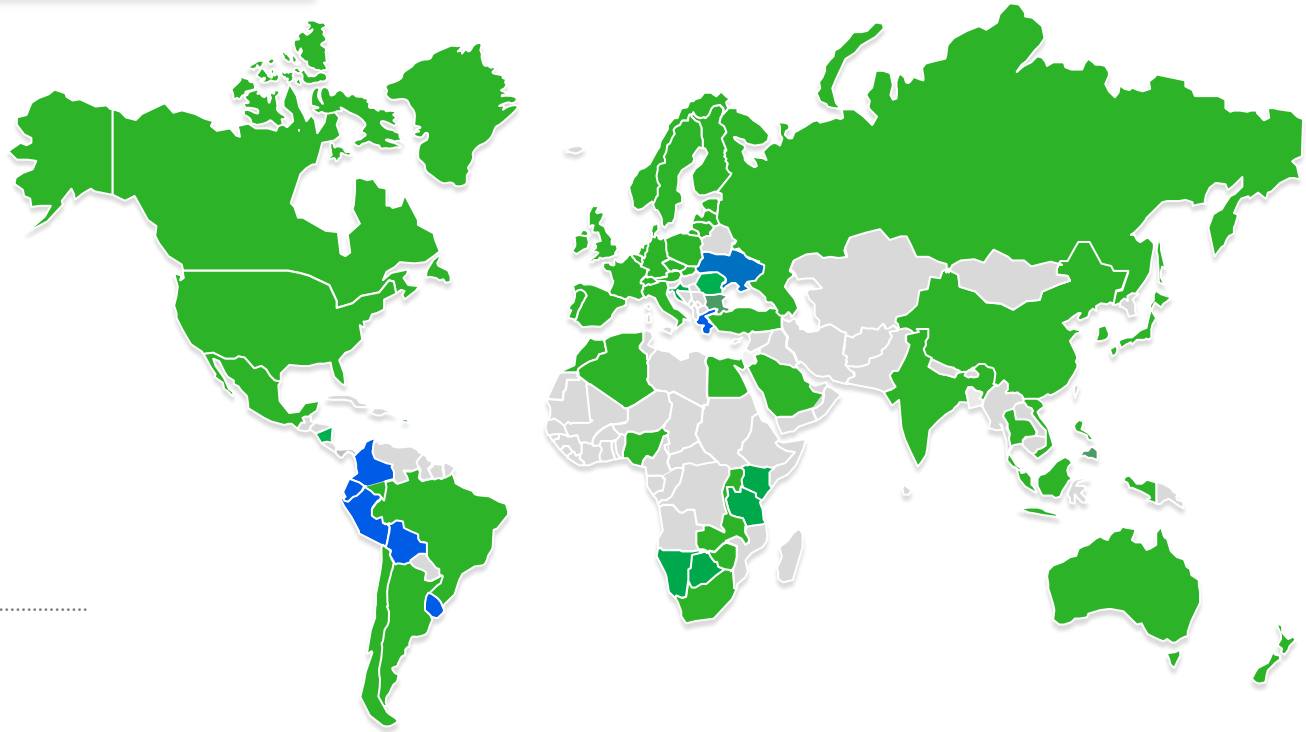Chile
Colombia
Ecuador
Guatemala
Honduras
Mexico
Panama
Peru
Puerto Rico
USA

Europe

Austria
Belgium
Bulgaria
Croatia
Czech Republic
Denmark
Finland
Estonia
France
Germany
Greece
Hungary
Ireland
Italy

Latvia
Lithuania
Luxembourg
Monaco
Netherlands
Norway
Poland*
Portugal
Romania
Russia*
San Marino
Serbia
Slovakia
Slovenia
Spain

Sweden
Switzerland
Ukraine
United Kingdom

Africa

Algeria
Botswana
Egypt
Kenya
Namibia
Nigeria
Morocco
South Africa
Tanzania
Zambia
Zimbabwe

Asia / Pacific

Australia
China
Hong Kong
India
Indonesia
Japan
Malaysia
New Zealand
Philippines
Singapore
South Korea
Taiwan
Vietnam
Thailand

Middle East

Israel
Qatar
Saudi Arabia
Turkey
United Arab Emirates

71	1	7
GENERAL AVAILABLE COUNTRIES	**COUNTRIES IN DEVELOPMENT PLAN**	**COUNTRIES ON ROADMAP**

* Rental Management, Project Management and Maintenance Customer Orders are not localized

Languages

Arabic
Bulgarian
Chinese - Simplified
Chinese -Traditional
Czech

Croatian
Danish
Dutch
English
Estonian
Finnish

French
German
Greek
Hebrew
Hungarian
Italian

Japanese
Korean
Latvian
Lithuanian
Norwegian
Polish

Portuguese
Romanian
Russian
Serbian
Slovene
Spanish

Swedish
Thai
Turkish
Ukraine
Vietnamese

32	0	2
GENERAL AVAILABLE LANGUAGES	**LANGUAGES IN DEVELOPMENT PLAN**	**LANGUAGES ON ROADMAP**

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Our journey
Next 12 months

Industry

- FDA compliance-based industries
- Central Procurement
- Enterprise Quality Management v1
- Cross company projects and planning
- PLM – multiple enhancements for process and fashion
- Centralized order stop management
- More on Trade Agreements, Internal Sales and Corporate Accounting
- Sustainability v1 incl. env. tax reporting
- Webshop & POS end-to-end process
- New tool for Audit files

Operation

- **New integrations**: MES (Lighthouse), Infor TMS, Salesforce.com; Dynamics CRM; Shopify
- **Enhanced integrations**: Infor WMS; CPQ for manufacturing config; Rhythm, Nexus
- Inbound EDI with SPS Commerce
- Zero down time; Mega scalability
- Deeper extensibility and more APIs
- Real-time streaming and Data Fabric
- Application Configuration Management
- Transactional archiving in Data Lake

Innovation

- 10+ new industry homepages
- C-suite integrated analytics
- Open Content Framework; embedded & micro vertical analytics
- Purpose built widgets and workflows
- More pre-configured "personalization" of applications
- Data management and loading templates for faster initial deployment
- Real-time decision support via Machine learning
- Coleman 'Watchlist' processing

Experiences

- Leverage Infor OS Portal to introduce new CloudSuite 'workspaces'
- High productivity UX – new user experience platform for initial processes with high configurability
- New MFS; CLM Apps & real time CLM Dashboards; CLM analytics
- M3 Portals – self service
- Industry workbenches to key processes like Shopfloor and Quality Control
- M3 DMP – MT deployment
- Factory Track usability and productivity

…plus hundreds of detailed industry and legal features…

Industry– Planned Q1 2023

Sustainability
Environmental

A new module supporting our customers work for a sustainable future

- Environmental reporting for corporate and companies

- Environmental declaration per product

- Environmental taxes

- Based on standards such Global Reporting Initiative (GRI) and / or Sustainability Accounting Standards Board (SASB)
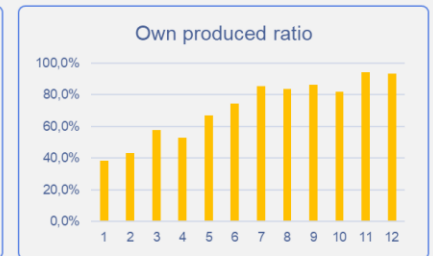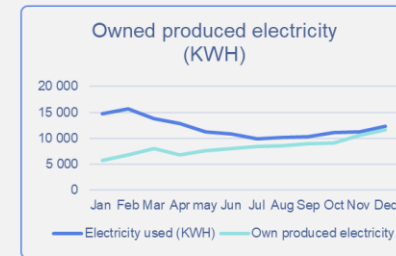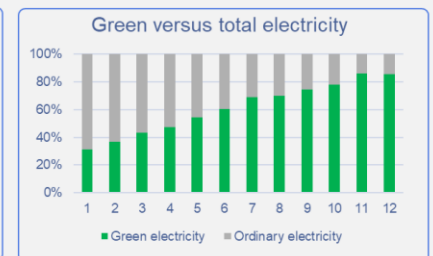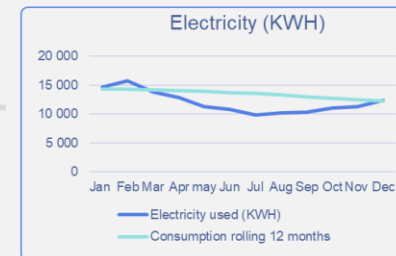

Strategic goals
Our strategic goals for electricity are
- Reduce the consumption
- Increase purchase of green electricity
- Build up own production of electricity

Decided activities
Reduce consumption
- Install more efficient machine that consume less electricity
- Change lights to LED

Green electricity
- Replace old agreements with new green agreements when the old one are due

Own production
- Install solar panels at the roof
- Buy parts of a wind power company

Activity log
(Change to LED lamps)
- 2021-02-23 – All lights changed in building A
- 2021-06-18 – All lights changed in building C

(Install solar panels)
- 2021-01-15 – Contracts signed with Sun tech
- 2021-03-15 – Implementation started
- 2021-19-15 – Live with first phase

Electricity (KWH)

Green versus total electricity

Owned produced electricity (KWH)

Own produced ratio

Fall 2021 – Corporate PowerPoint Template | December 2021   22

Value

- Simplify our customers work with sustainability work

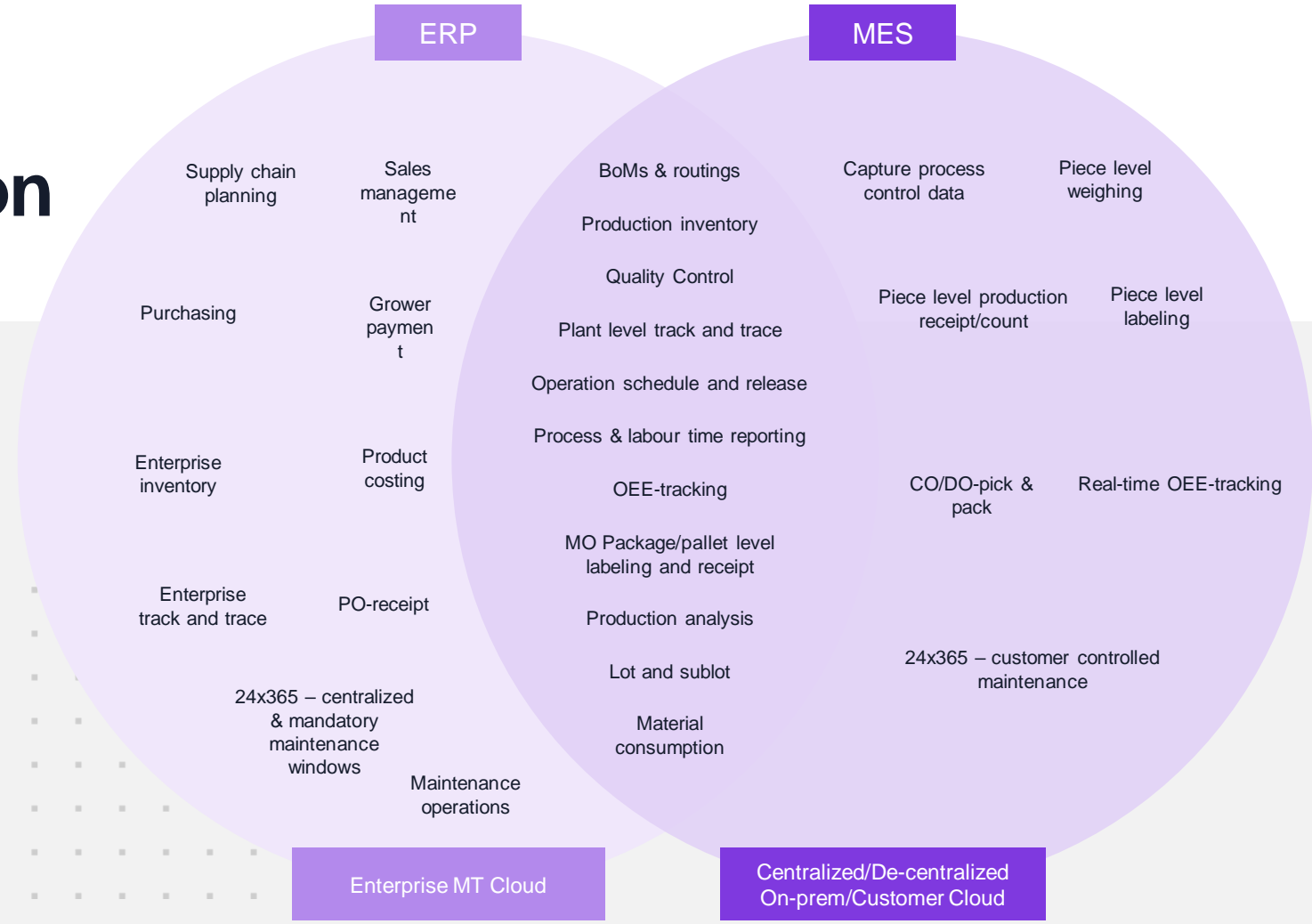- Facility our customers ambition to be a good citizen

Infor MES
Manufacturing Execution

Integrate to MES (Manufacturing Execution Systems):

- MES interface to Infor MES – former Lighthouse
- 24x365 availability
- Real time data from production equipment
- Piece-level receipt, weighing and labeling
- Real-time OEE-tracking
- Real-time quality and process control
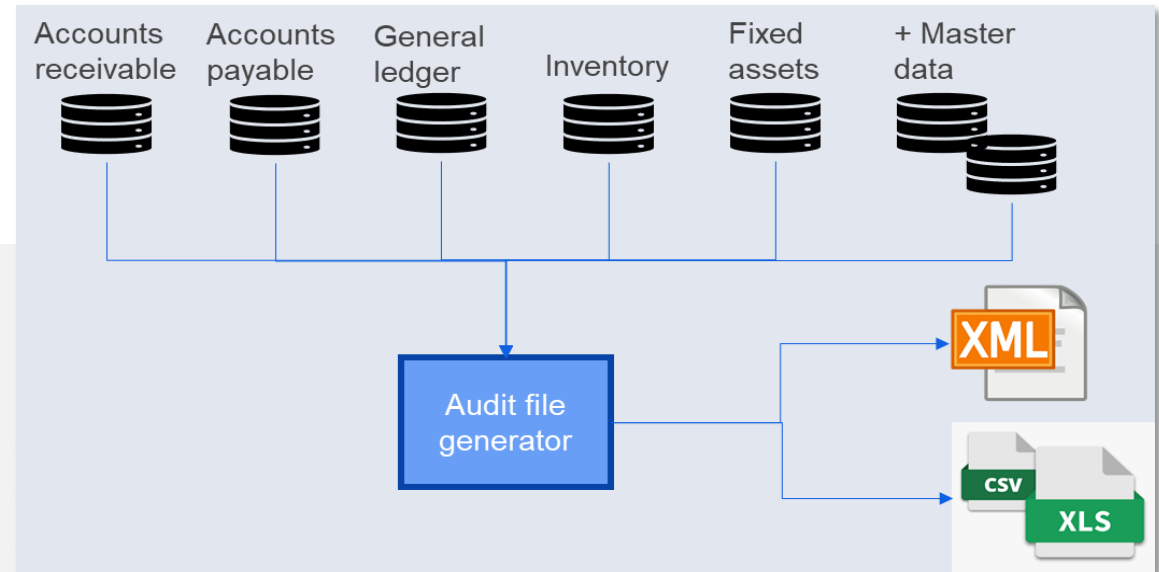- Employee and product-based activity tracking for payroll

ERP

Supply chain planning

Sales management

Purchasing

Grower payment

Enterprise inventory

Product costing

Enterprise track and trace

PO-receipt

24x365 – centralized & mandatory maintenance windows

Maintenance operations

Enterprise MT Cloud

MES

BoMs & routings

Capture process control data

Piece level weighing

Production inventory

Quality Control

Plant level track and trace

Piece level production receipt/count

Piece level labeling

Operation schedule and release

Process & labour time reporting

OEE-tracking

CO/DO-pick & pack

Real-time OEE-tracking

MO Package/pallet level labeling and receipt

Production analysis

Lot and sublot

24x365 – customer controlled maintenance

Material consumption

Centralized/De-centralized On-prem/Customer Cloud

34

Infor Distribution Enterprise – planned late 2022

Financial accounting
New tool for creating electronic audit files

A trend within government control is to introduce electronic audit files. Companies are obliged to create an audit file each month and if requested send it to the government

- Define the report required from the government

- Connect each XML tag to the CloudSuite database

- Create the report

Accounts receivable · Accounts payable · General ledger · Inventory · Fixed assets · + Master data

Audit file generator

XML · CSV · XLS

Value

- Reduce time to market, faster response to changes

- Increase number of supported formats

Innovation – Planned 2022 and onwards

M3 Industry Analytics
Decision Support

Providing interwoven decision support capabilities at the forefront of our digital transformation strategy

Decision Support

- Open Content Framework (Lake house adoption)

- Data Fabric & Compass adoption

- Embedded Analytics into core roles and homepages

- Opportunity Management (M3 CLM)
- Rental Metrics consolidated in core package
- Micro Vertical Analytics (USDA Reporting for Milk)
- Sustainability Analytics

Product Roadmap - M3 CloudSuites

Value

- Value realization with industry specific content

- Innovating with embedded analytics across the CloudSuite leads to:

  - Greater adoption

  - Improved Productivity
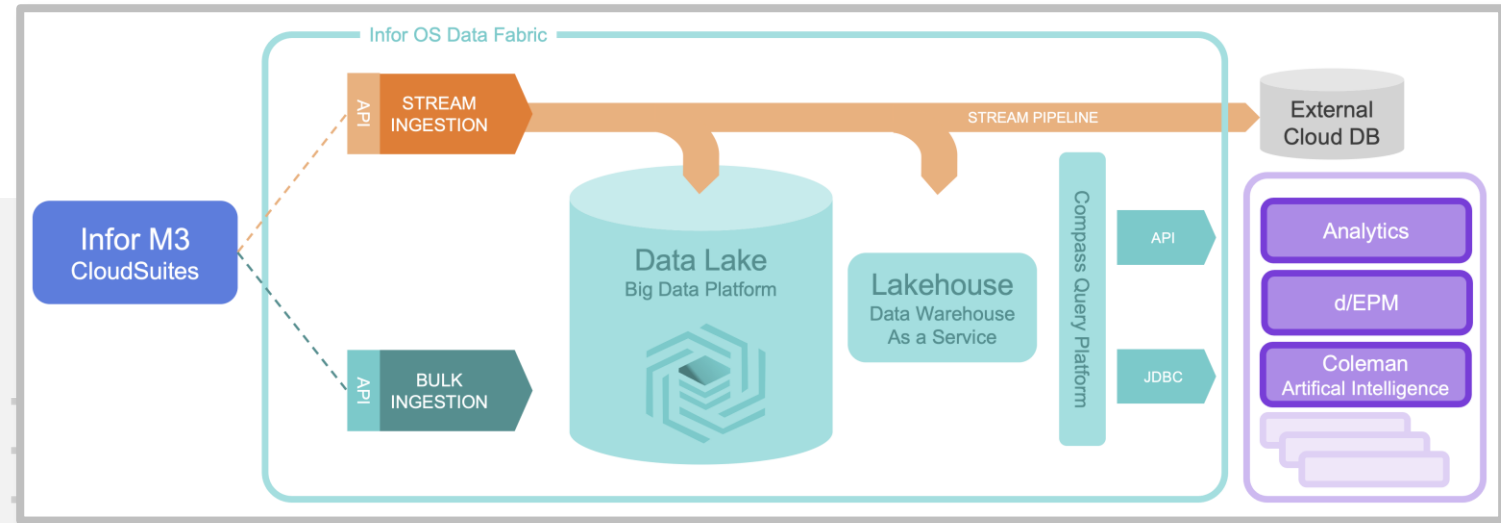
  - Competitive advantage

Data Strategy
M3 & Data Fabric

Real-Time Streaming and Pipelines
M3 using Infor OS Data Fabric

- M3 enables Data Fabric streaming ingestion for selected beta-customers in 2022.10
- Data Fabric Pipelines will bring data in real time to a destination database
- Destination for streaming pipelines will start with AWS Aurora PostgreSQL for selected beta customers by end of 2022
- Additional connectors for destination platforms will be available during 2023

Infor OS Data Fabric

STREAM INGESTION — API

STREAM PIPELINE

External Cloud DB

Infor M3 CloudSuites

BULK INGESTION — API

Data Lake
Big Data Platform

Lakehouse
Data Warehouse
As a Service

Compass Query Platform

API

JDBC

Analytics

d/EPM

Coleman
Artifical Intelligence

Value

- Data Fabric Pipelines bring data to a destination database in real time to support operational reporting as well as connected applications with real time data requirements

- M3 streaming to Data Fabric for pipelines and storage in Data Lake as a Big Data platform

- Bulk ingestion helps uploading large batches of data into Data Lake

Infor Distribution Enterprise – CA planned late 2022

Experiences
Portals – issue management

New capability for managing concerns and issues

- Utilizes the new M3 Portals technology platform
- Highly configurable, role-based solution
- Targeting zero end-user training
- Designed for end-customer self-service
  - create and monitor issues
  - Integration to IDM
- New M3 capabilities
  - automated corrective action flows
  - follow up tasks and actions
  - Multiple issue resolutions

Value

- End user self service reduces internal effort
- Quick and efficient process captures information at source
- Easy to use and configure
- Flexible technology base

Later planned to follow
- Supplier Portal
- Customer Portal

Compliance
Digital Signatures

Digital signatures to help support 21CFR part 11 for FDA compliance:

- Enable digital signatures for selected M3 processes
- Allow single and multi level approvals
- Support e-record capability to review who signed and what was signed

Value

- Enables customers to adhere to FDA compliant processes
- Digital processes built-in at the core of the suite
- Allows existing life-science customers to upgrade to cloud

Industry - Planned for 2022 and onwards …

Quality Management
Highlights

Securing safe and top-quality products and improve efficiencies through less waste and returns:

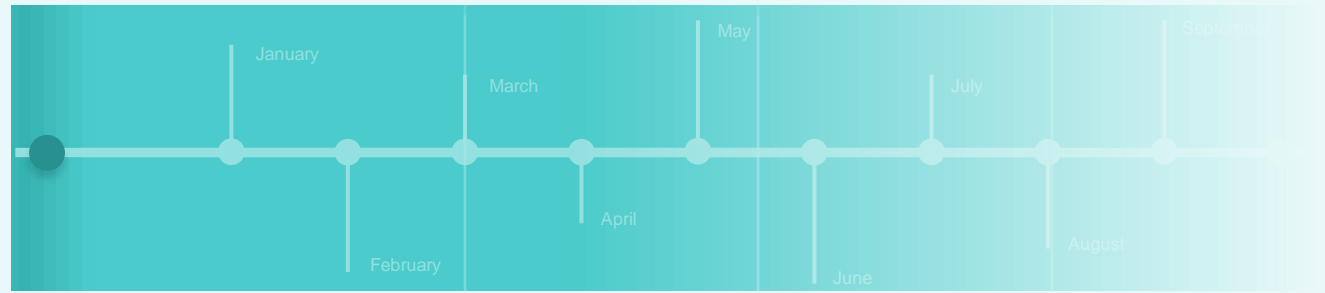|		
Exit points for Adaptive AI-based test frequency	Statistical process control using Birst	Mobile & Robotic Quality Inspection
Integrated equipment calibration schemas	CAPA - Corrective & Preventive actions	COA – advanced document control

Our journey
Next 12 months

The timeline at the top shows the months: January, February, March, April, May, June, July, August, September.

Industry

- FDA compliance-based industries
- Central Procurement
- Enterprise Quality Management v1
- Cross company projects and planning
- PLM – multiple enhancements for process and fashion
- Centralized order stop management
- More on Trade Agreements, Internal Sales and Corporate Accounting
- Sustainability v1 incl. env. tax reporting
- Webshop & POS end-to-end process
- New tool for Audit files

Operation

- **New integrations**: MES (Lighthouse), Infor TMS, Salesforce.com; Dynamics CRM; Shopify
- **Enhanced integrations**: Infor WMS; CPQ for manufacturing config; Rhythm, Nexus
- Inbound EDI with SPS Commerce
- Zero down time; Mega scalability
- Deeper extensibility and more APIs
- Real-time streaming and Data Fabric
- Application Configuration Management
- Transactional archiving in Data Lake

Innovation

- 10+ new industry homepages
- C-suite integrated analytics
- Open Content Framework; embedded & micro vertical analytics
- Purpose built widgets and workflows
- More pre-configured "personalization" of applications
- Data management and loading templates for faster initial deployment
- Real-time decision support via Machine learning
- Coleman 'Watchlist' processing

Experiences

- Leverage Infor OS Portal to introduce new CloudSuite 'workspaces'
- High productivity UX – new user experience platform for initial processes with high configurability
- New MFS; CLM Apps & real time CLM Dashboards; CLM analytics
- M3 Portals – self service
- Industry workbenches to key processes like Shopfloor and Quality Control
- M3 DMP – MT deployment
- Factory Track usability and productivity

…plus hundreds of detailed industry and legal features…

Experience

Usability
M3 Experience

A new M3 user interface with modern design and new capabilities such as:

- New cloud architecture
- Stateless and decoupled
- Responsive design
- Role based processes across M3 functions
- Fully configurable down to field level
- Embedded UX design tooling
- Coexist with current H5 client
- Phased roll out based on processes

Controlled availability November 2022

Value

- Process oriented user experience
- Flexible with tool support
- Role based for high productivity

Experience

Usability
M3 Experience

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new capabilities such as:**

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What does it mean:

- The transition to the new UI capabilities will be a journey

- View the New UI as a compliment to existing UI capabilities – a continuous evolution in cloud

- New UI and existing will work side by side – same menu, same tabs, same kind of personalizations

- New UI will be released initially with 3-4 apps and with known limitations

- Continuous additional deliveries over the next many quarters

- Projects should focus on current UI – and evaluate new UI capabilities when available and applicable

M3 Experience

Rich role-based User Experience model

- Process Applications for role based composite applications

- Functional Applications as default UI for new M3 functions

- Common architecture based on configuration with embedded tooling

Process applications delivered at initial launch

- Credit control

- Service agreement

- Manufacturing Workbench

- Buyer Workbench

Customers and partners can configure their own applications

Process Apps

Function Apps

Tooling

Configuration

Controlled availability
November 2022

Team lead, manufacturing

Robert, manufacturing, 9 years of experience

37 years old, male, college graduate, lives in the suburbs

Domain expertise:

Tech savviness:

Openness to change:

Amount of travel:

Goals:

1. Make sure manufacturing orders are finished in time.
2. Priorities the work to make the number of orders produced as high as possible.
3. Be efficient in his work

Responsibilities:

- Deliver MO on schedule.
- Report material issues for expensive materials on certain types of orders.
- Check that the manufacturing orders have the correct information
- Check that the correct documentation is connected to the MO

Working environment:

- Spends his time 50-50 working on the shopfloor/at the office.

Technology used:

- In-office computer
- Brings a laptop and smartphone (Infor Go) to the shopfloor

Background story:
Robert has 9 years of experience as a manufacturing team lead. His responsibility is that the product works as smoothly as possible and that all staff and machines are fully utilized.

Typical day:

- Start his day by getting an overview of the main tasks of today
- Identify potential bottlenecks
- Assign tasks to his team
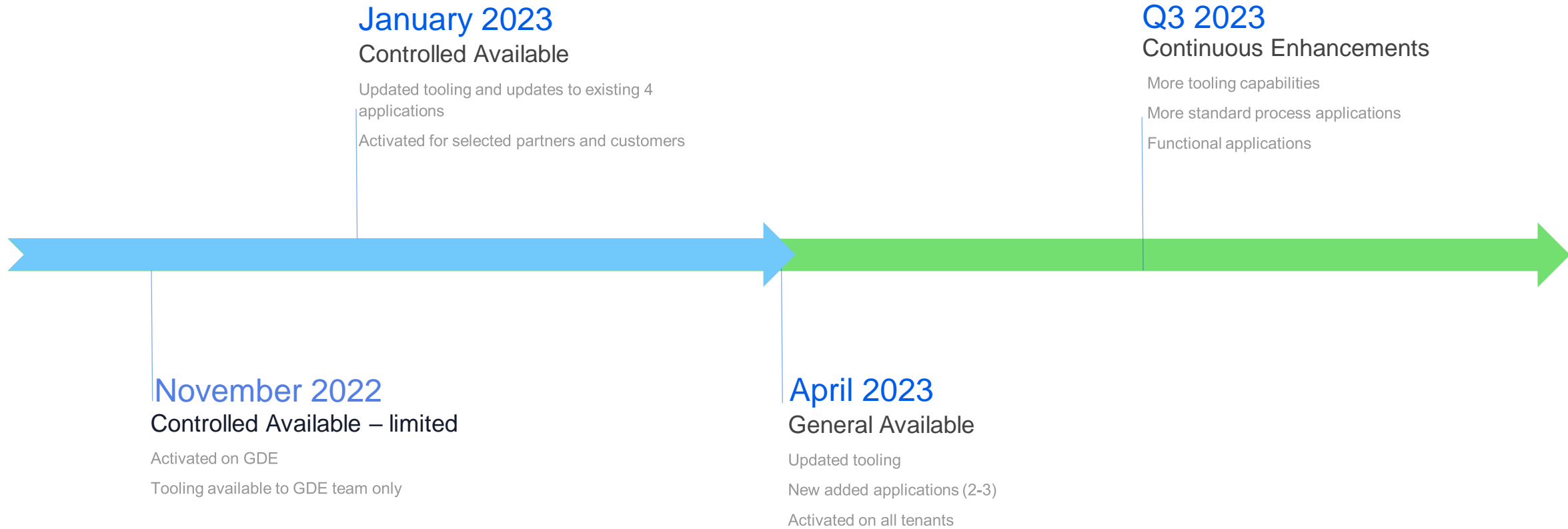- Provide additional instructions to his team.

Ideal experience:

- All important alerts will be communicated via homepage/Infor Go/Mail… For example, if we haven´t finished an order on time, if an order hasn´t started on time.
- The homepage will give you an overview of the situation in the manufacturing area Robert is leading.
- With the manufacturing overview application Robert can get a clear picture of each order quickly, to know the team is working on the right things.
- He will also do his reporting task in the application, material issue.

Pain points:

- The information he needs is found in different places
- When he gets an alert that something urgent has happened, it takes time to find information needed to take the correct decision.
- A lot of papers used everywhere on the shopfloor
- Laptop is too large to carry around sometimes

infor

Start Typing

Manufacturing overview

Manufacturing overview

Manufacturing overview

Search

Sort by: Start date

4001010476
Product: 3887799
Name: Imaged Laptop
Start date: 20220316

4001010475
Product: 3887799
Name: Imaged Laptop
Start date: 20220316

4001010478
Product: 26-88003
Name: Hydraulic 46 Grade A in IBC
Start date: 20220606

4001010480
Product: 26-88003
Name: Hydraulic 46 Grade A in IBC
Start date: 20220607

4001010481
Product: 26-88003
Name: Hydraulic 46 Grade A in IBC
Start date: 20220609

4001010479
Product: 26-88003
Name: Hydraulic 46 Grade A in IBC
Start date: 20220613

4001010171
Product: 26-88003
Name: Hydraulic 46 Grade A in IBC
Start date: 20220718

4001010172
Product: 26-88003
Name: Hydraulic 46 Grade A in IBC
Start date: 20220826

MO number	Product			Order qty bU/M	Manuf quantity	Mfg U/M
4001010475	3887799			1.000000	0.000000	EA

MO overview | **Materials** | Operations | MO transaction history

Materials

Check availability

Sequence no	Operation no	Component no	Name	Quantity	Reported qty	Pe U/M	Material status	Warehouse
[A]	[A]	[A]	[A]	[A]	[A]	[A]		[A]
10	10	3887798	Purchased Laptop	1	0	EA	22	231
20	10	388001	Power Pack CN	2	2	EA	99	231
40	10	388101	Instructions CN	1	1	EA	99	231
60	10	388201	Packaging CN	1	1	EA	99	231

Stock balance - materials

Item number	Name	Warehouse	Description	Location	On-hand approve	Basic U/M	Lot number
[A]	[A]	[A]	[A]	[A]	[A]	[A]	[A]
388101	Instructions CN	231	James Hall Preston DC	A0103	789	EA	

Material requisitions

Page 1 of 2

Report material issue

Sequence no
40

Component no
388101

Reported qty
1

Pe U/M
EA

Credit control manager

Cim, finance, 7 years of experience

34 years old, female, college graduate, office-based

Domain expertise: ●●●●●●●○○○
Tech savviness: ●●●●●○○○○○
Openness to change: ●●●●○○○○○○
Amount of travel: ●○○○○○○○○○

Goals:

1. Answer requests from customer service around stopped orders and blocked customers in a quick and correct way
2. Make sure that customer credit data is up to date
3. Be efficient in her work

Responsibilities:

- Create and maintain financial customer data related to credit control
- Communicate findings to key stakeholders

Working environment:

- Spends most of her time on her computer in her office
- Occasionally works from home on a laptop
- Mostly uses Infor M3, ION workflow and Infor document management

Background story: Anna has been a credit control manager for 5 years. Her role is to support customer service with decisions regarding customer blocks and stopped orders….

Typical day:

- In the morning, she checks her homepage for tasks to do from customer service (workflow tasks)
- She goes through the tasks, and reports back to customer service how to act.
- Once the day-to-day business is taken care of, she maintains and creates financial customer data, checks reports on how customers are performing regarding payments
- Sometimes she gets urgent credit check requests, and these request can show up after working hours. When that happens, she needs to login to her laptop and quickly find the information needed to answer.

Ideal experience:

- One place to go to get all information needed to take the right decision

Pain points:

- Information needed to take the best decision needs to be gathered from several different parts of M3/IDM
- It takes quite a long time and many post-it notes to see the whole picture

Credit control workbench

Experience Designer Dashboard

Credit Control _Majestic Renovations

Credit Control

🔍 ren* ✕

Sort by: Entry Date ▾

Majestic Renovations
Customer: 26-37456

DATE: 2022 / 08 / 21

26-37456
Majestic Renovations

Telephone: Primary	Organization	VAT reg no
+33676593671	No 1	VATCRS610

Stopped Orders | Open Orders | Accounts Receivable | **Customer Details**

Customer Stop	Salesperson	
25	Hendrik Assink 🔍	ASSHENO

Payment Terms	Responsible	
N30 🔍	Gunilla Andersson 🔍	GANDERSSON

Unappr Limit	Insurance Limit	Insurance Co
0,00	0,00	

Customer no insur	Insurance sts	Cash disc term
sdfsdf	0	🔍

Credit dept Ref	Valid Media	Payment mtd AR
sdfsdf	0	CSH 🔍

Credit Limits ▾

200K	63%
Credit Limit (AUD)	Utilized

126K spent	74K available

Quick Actions

(Invoice Status)

(Pending Estimates)

Addresses

Type	Number	Name	Address
1	001	Inspect and Repair	6/7/2018
1	Compressor	Inspect and Repair	12/5/2018
1	I Love Compressors	Inspect and Repair	2/2/2018
	Compressor	Inspect and Repair	9/9/2018
	Awesome Compressor	Inspect and Repair	8/8/2018

001
Eastern Builders
12 Windsor Road

Majestic
Renovations LLC
Recently viewed

Infor M3 CloudSuites:

INDUSTRY SPECIFIC

Industry focused, pre-configured yet flexible, solutions based on Infor application suites, delivering industry leading business processes

READY-TO-GO CONTENT

Rich content to give a higher and more precise starting point and lower the cost of implementation

GROWS WITH YOUR BUSINESS

The Infor CloudSuites are built on a true cloud architecture that will scale with your business requirements and be fluid to handle the constant change of processes

GLOBAL COVERAGE

Infor CloudSuites are global and can help your business around the globe to be legal compliant and follow local rules

LEADING CLOUD TECHNOLOGY

Infor is constantly investing in our Cloud technology that form the basis for the Industry CloudSuites. These are built on the latest technologies utilizing the proven AWS platform

CONTINUOUS INVESTMENTS

Infor is continuously investing in our Industry CloudSuites adapting new technologies, broaden our footprint and providing new and deeper industry functionality

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Thank you

Infor is a global leader in business cloud software specialized by industry.

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